SAMPLE DELIVERABLE · ILLUSTRATIVE

Calibrane

Strategy. Transformation. Intelligence.

Transformation roadmap: three waves

How competing initiatives are prioritised, sequenced and measured. This sample continues the fictional services organisation from our capability map and process samples. It is not a client deliverable.

	Wave 1 · Fix the foundations Months 0 to 3 · quick wins and enablers	Wave 2 · Join it up Months 4 to 9 · shared data and processes	Wave 3 · Scale what works Months 10 to 18 · automation and AI where justified
Strategy & architecture	Agree target operating model for Serve and Bill Owner: COO Set up architecture decision forum Fortnightly, 45 minutes	Target-state architecture for customer data Depends on: data ownership	Refresh capability heat map and re-prioritise Annual cycle
Process	Redesign customer onboarding See process sample	Redesign billing disputes and complaints Reuses onboarding pattern	Continuous improvement routine in each team
Data & technology	Name an owner and definition for customer data	Single customer record shared by CRM, billing and finance Largest dependency in the plan Retire two duplicate spreadsheets	Reporting from one source of truth
AI & automation	AI readiness assessment and use-case scoring	Automated completeness and credit rules Human reviews exceptions	Pilot AI triage of complaints, only if it beats simpler options Governed under UK and Nigerian rules
People & skills	Capability needs assessment	Process and requirements training for team leads	AI for everyday productivity, all staff
	Gate 1: onboarding redesign approved and baseline measured	Gate 2: single customer record live; benefits reviewed	Gate 3: AI pilot proves value against its baseline, or stops

How initiatives were prioritised

- Strategic importance of the capability it improves
- Size of the gap on the heat map
- Dependencies: enablers go first
- Cost, risk and readiness

Critical dependencies

- Customer data ownership before the shared record
- Shared record before automated credit rules
- Clean, governed data before any AI pilot

Measures tracked at each gate

- Days from deal to live account
- Billing disputes per 100 invoices
- Hours of manual rekeying per week
- Staff confidence in reported numbers